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RECORDS MANAGEMENT HANDBOOK

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*Managing Correspondence*

# FORM LETTERS

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GENERAL SERVICES ADMINISTRATION  
NATIONAL ARCHIVES AND RECORDS SERVICE  
RECORDS MANAGEMENT DIVISION

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## I. FORM LETTERS NEED MANAGING

### PRINTED LETTERS ARE HERE TO STAY

Do you know that the Federal Government writes 4 million letters a workday, 139 letters a second?

In this ceaseless flow of paperwork, no matter where you look, you will find that humble missive, *the form letter*.

The fact is, few Government agencies have budgets large enough to do business without printed form letters. Even if the budget permits, there are seldom enough typists and stenographers to go around. From sheer necessity, then, if for no other reason, the printed letter is here to stay.

Why not make better use of these essential time and money savers? Why not follow a plan that will help you turn out form letters of real merit?

Form letters of merit can increase your agency's dividends in time and money saved. They can do even more than typed letters to improve public relations by giving the person who receives one these distinct advantages:

*The form letter reaches him promptly. (Dictation and typing time are cut out.)*

*The form letter is correct in every detail, easy to read and easy to understand. (Carefully composed form letters make a better impression than hurriedly dictated ones.)*

*And finally, as the chart on the next page will show, the form letter saves his, the taxpayer's, money.*

### THE FORM LETTER MANAGEMENT PLAN

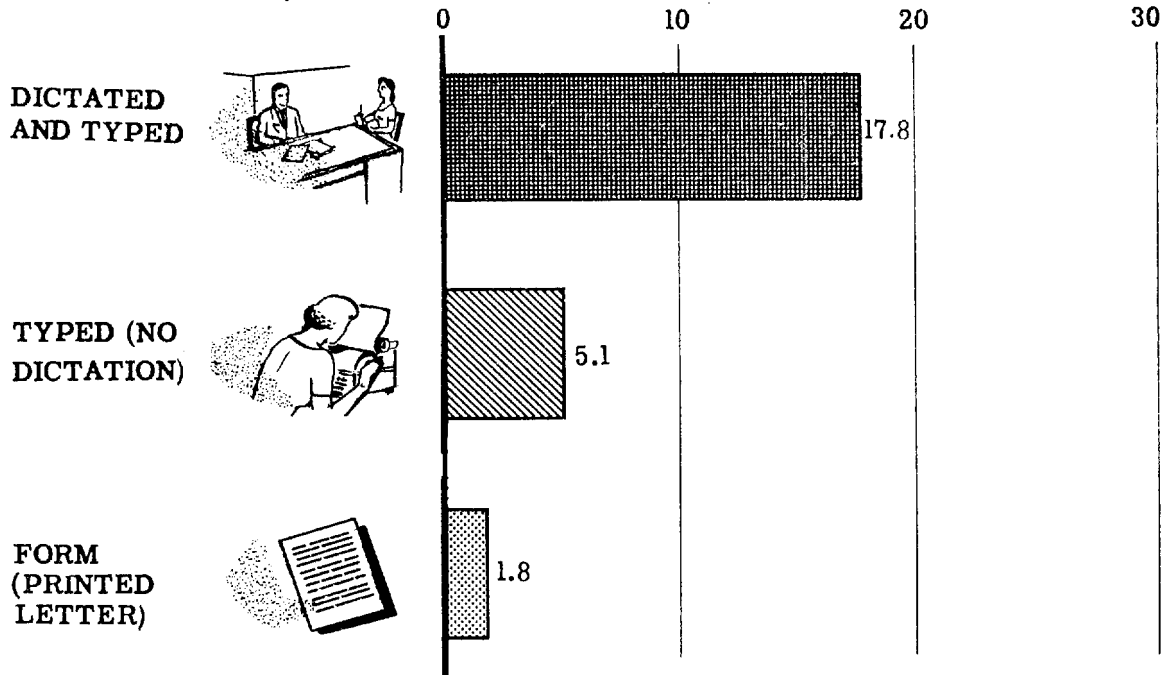
This pamphlet describes a management plan designed to help you recognize letters that should be printed and letters that should not be printed. It shows you how to guard against the kinds of form letters so often maligned: Hastily written "all-purpose" letters that chill even the friendliest reader, and "brush-off" letters as ill-mannered as they are meaningless.

All the more important phases of a form letter management plan are described, from the first steps in gathering information to the final steps in measuring savings. The standards and techniques suggested have been drawn from the experiences of a number of Government agencies now profiting from form letter management. Those agencies whose letters are exhibited have made especially significant contributions.

## TYPICAL CORRESPONDENCE PRODUCTION COSTS

per 20,000 letters in thousands of dollars

### MEDIUM LETTERS, ABOUT 175 WORDS



### FULL PAGE LETTERS, ABOUT 300 WORDS

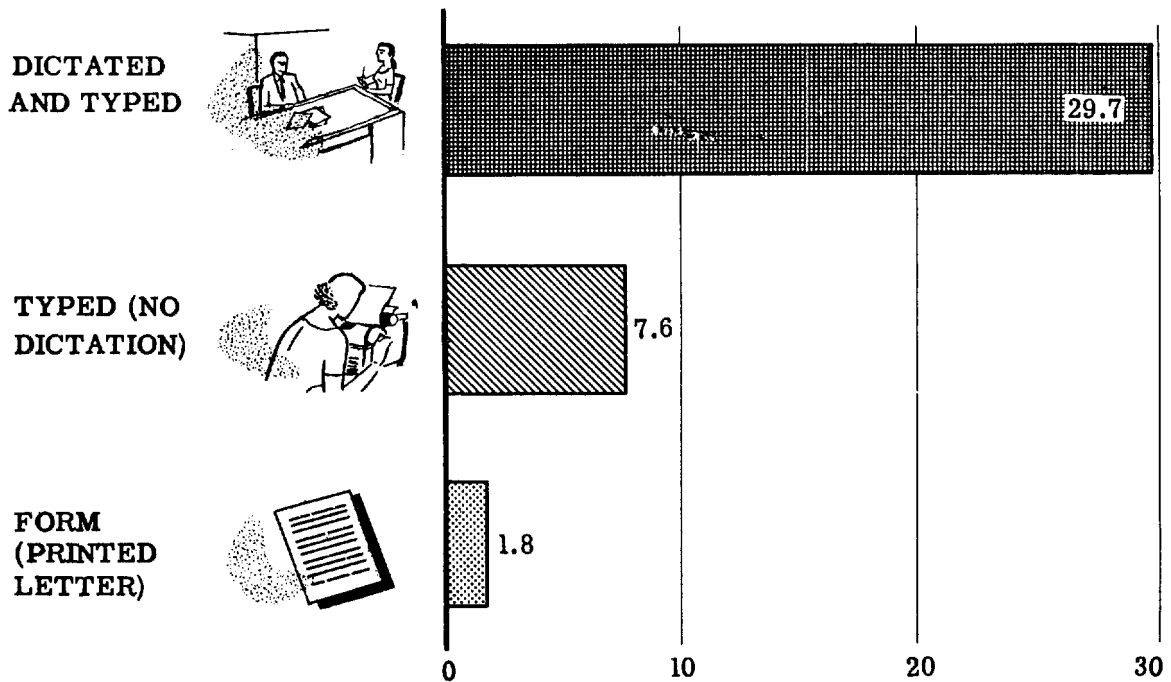


Figure 1.

## **II. CONDUCTING A FORM LETTER IMPROVEMENT PROJECT**

### **WHAT DO YOU MEAN WHEN YOU SAY "FORM LETTER"?**

Obviously, nobody need be told what a form letter is. But before beginning a form letter improvement project, it is essential that you decide on the kinds of letters you intend to include in your project study.

One agency defines form letters this way:

"A form letter is a letter printed or otherwise reproduced and stocked in advance of its actual use."

You may elaborate on this definition. You may specify that the printed letters include not only conventional business-style letters, but also printed memorandums, printed postal cards, and printed informational slips that take the place of letters.

You may also specify what you intend form letters not to include. For instance, you may exclude a form letter that serves its purpose in one mass mailing.

Consider all styles and purposes of letter. Then, if you need to define the term for others, compose your definition so there can be no mistaking your meaning.

### **GATHERING INFORMATION**

A form letter improvement project is initiated in a large office by issuing a memorandum similar to the one exhibited on page 4. The memorandum requests the people concerned with correspondence to furnish a sample of each existing form letter with information as to the number of times each was written during a two-week period. It also requests that an extra copy be made of each letter typewritten during the same two weeks.

Of course, memorandums initiating form letter improvement projects may vary considerably.

If you are conducting a big project, involving a number of organizational units, the first memorandum may request a sampling of form letters only.

If your project is small - involving, perhaps, only the unit or section which you supervise, a formal memorandum may not be needed.

### **FACT FINDING AND APPRAISING**

When the collection is received at the point where the study will be made, keep the organizational breakdown, if any, intact, analyzing the letters of one unit at a time.

STANDARD FORM NO. 64

*Office Memorandum* • UNITED STATES GOVERNMENT

TO : All persons concerned with preparing correspondence      DATE: June 1, 1954

FROM : Chief, Division *[Signature]*

SUBJECT: Form letter improvement project

1. To carry out our Division's program for correspondence improvement, we need to know how often we use our existing form letters. We also need to collect copies of letters that are typewritten.

2. Accordingly, for the two-week period beginning - - - - and ending - - - -, each stenographer and typist is requested to:

- a. Keep count of the number of times each form (printed) letter is prepared.
- b. Make one extra copy of all typewritten letters and memorandums, except those classified as secret or confidential.

3. At the end of the two weeks, the usage count on form letters and the carbon copies of typewritten letters will be turned over to the supervisors. The supervisor will:

- a. Secure a sample copy of each form letter used in his or her unit, and write the following information on the face of each sample:

- (1) The total times the form letter was written during the two-week period, as reported by the typists and stenographers. (Any sample letter which was not actually sent out during the period should be marked "Not used.")
- (2) The number of copies, other than the original, that must be prepared, and the purpose of the copies; for example:

General Files - 1  
Courtesy - 1  
Suspense File - 1

- b. Bundle the sample form letters with the copies of the typewritten letters, and label the bundle with the name of the organizational unit.
- c. Deliver the bundle to - - - - -.

Figure 2. MEMORANDUM INITIATING A FORM LETTER IMPROVEMENT PROJECT

*First*, read through the carbon copies of the typed letters, sorting out letters that are similar in meaning and purpose. These are form letter possibilities.

(Sometimes form letter possibilities can be recognized at a glance by the similarity of the structure of typed letters, as length, paragraphing, etc. More often, however, it is necessary to glance through the text, for letters serving exactly the same purpose often vary in wording and length.)

*Next*, clip each group of similar letters together or place them in folders. Mark the top letter with the total number of letters in the group.

*Then*, add the groups thus assembled to the sample form letters collected for the project. You now have the *existing form letters*, as well as some *form letter possibilities*. You are ready for analysis.

You must decide:

1. *The existing form letters that should be discontinued.* This is determined by the number of times the form is used, and the suitability of the subject matter for a printed letter.
2. *The existing form letters that should be rewritten or redesigned.* A letter should be rewritten if the language needs improving or simplifying. It should be redesigned if a new design would reduce the time required to prepare it for mailing.
3. *The form letter possibilities that should be developed into new form letters.* This depends on the number of typed letters in the group, and on whether the subject matter is appropriate for a printed letter.

The next part of this book contains standards to help you make the above decisions. These standards will also help you draft and design the form letters which you decide to develop or revise.

## MAKING RECOMMENDATIONS

For the convenience of the officials who are to approve the new or revised form letters, each one should be presented in a separate folder. Here are a few suggestions on submitting form letter recommendations:

1. On the right side of the folder, place the draft of the recommended form letter. On the left side, place the existing form letter or a copy of one of the typed letters which it is to replace.
2. Label the folder with the subject of the form letter.

**3. On the subject label, or on a sheet of paper placed in the folder, give any other appropriate facts or recommendations, as:**

- a. Number of times the letter is used a month.**
- b. Number of copies recommended to be prepared each time the letter is written; for example: Original and 1 file copy.**
- c. Savings that will result from using the new or revised form letter. (See page 31.)**
- d. The best method of processing the letter. (See page 18.)**
- e. The quantity that should be printed. (See page 18.)**



### III. STANDARDS

There are certain standards that all form letters should meet. When a form letter falls below these standards you get poorer quality and higher cost. When it rises above them you get a quality or savings bonus for exceptional performance.

The standards suggested below are not hard to live up to. They may not in all instances be suitable for the form letters with which you are concerned, but they will guide you in developing your own.

#### WHEN SHOULD YOU USE A FORM LETTER?

There are two tests to be made in deciding whether to use a printed letter. One test is for appropriateness; the other is for economy.

##### COMMON STANDARD

*A form letter is appropriate if:*

*It is about a routine business or informational matter.*

*It is not, in fact, a personal letter.*

*It is not a message that will bring grief or keen disappointment to the reader.*

*On the basis of a 3-month supply, a form letter is economical if:*

<i>Line count</i>	<i>Monthly</i>
<i>is:</i>	<i>usage is:</i>
<i>5</i>	<i>30 or more</i>
<i>10</i>	<i>20 or more</i>
<i>15</i>	<i>15 or more</i>
<i>20 or more</i>	<i>10 or more</i>

An inappropriate form letter - one that should not be printed - may result in damaged public relations. And obviously there is no advantage in printing a letter that can be typed at the same or at little additional cost.

The common standard shown here for appropriateness may be summed up in two words: good taste. For example, personal letters expressing appreciation are certainly in better taste when typed. And some Government agencies take a firm stand against printing letters that carry bad news of any kind.

An agency may have its own reasons for not printing letters on certain subjects. But routine informational and business letters can be printed by any agency without sacrificing good taste.

The common standard for measuring economy is based on a comparison of current typing and duplicating costs. In following the suggested formula, count only the lines in the body of the letter, but count partial lines as whole ones.

Fill-ins that must be typed or written in longhand in the body of a form letter add to the letter's cost. The monthly usage figures in the formula must, therefore, be increased when long fill-ins are required.

<b>DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE SOCIAL SECURITY ADMINISTRATION WASHINGTON, D. C.</b>		IN REPLY REFER TO FILE NO. 15:D
<b>Zone 25</b>		
BUREAU OF PUBLIC ASSISTANCE	A printed dot (.) makes an inconspicuous marking for the place to begin the address. The dot should be flush with the left margin and 2-1/4 inches from the top of the page.	
Mr. Samuel C. Egerton 99 Main Avenue Castroville, California		
Dear Mr. Egerton:		With a completely typed salutation the letter takes on a more personal appearance.
<p>This is in response or his family. The President asks us to answer the requests for financial assistance, loans, clothing, medical care, household equipment, and other services necessary to the health and welfare of people.</p> <p>No Federal funds are available to provide help directly to people. The assistance programs are State programs, and the State decides who is eligible for assistance. In order that help may be more adequate, the Federal Government shares in the cost of financial assistance to certain groups of needy people--the aged, the blind, dependent children, and the seriously disabled. Also, in some States there are programs of general assistance for people not coming within the other groups and programs for medical care. We suggest, therefore, that you get in touch with your nearest local public welfare office. If they cannot provide you with the help you seek, they would know whether there are other agencies in your community which might help you.</p> <p>May I say that we are sorry not to send you a more personal and hopeful reply.</p> <p style="text-align: right;">Sincerely yours,</p> <p style="text-align: right;">Director</p>		
PA-L522		

Figure 3. THE PLAIN FORM LETTER

## EASY READING

A sure way to lose your reader's interest, if not his friendship, is to send him a letter that's work to read. And, indeed, what excuse can we offer for hard-to-read *form* letters, destined for hundreds, perhaps thousands, of readings?

You can set an easy reading standard. The one shown here was adapted after taking into account the average length of a form letter, the frequency with which long proper names and titles are likely to occur in the text, and the chances for personal references.

A letter meeting the standard is free of long words, long sentences, and long paragraphs that make reading difficult and meaning obscure. Personal references, the names of persons, and personal pronouns such as "you," "he," "she," "we," and "they," also make reading easier.

### COMMON STANDARD

*If you want people to read form letters, and read them easily, aim at this standard:*

- 1. Short sentences, averaging not more than 21 words.*
- 2. Short words, not more than 165 syllables to 100 words.*
- 3. Personal references, about 4 personal references per 100 words.*

Easy reading is not, however, the only element of a good form letter. It may be the only one to which you can apply a yardstick. But equally important are these more abstract elements which should be checked carefully before any letter goes to print:

Courtesy  
Correctness  
Logic  
Style


## PICKING A PATTERN

A letter may be designed in a number of ways that are attractive as well as considerate of the typist. You may choose the most appropriate pattern from six standard designs, or from a combination of these designs.

*Plain Form Letter.* So simple is this pattern that discussion of the design may appear unnecessary. There are several techniques, however, that may be used to give plain form letters the appearance of individually typed ones. These techniques are illustrated in Figure 3.

Never overlook the possibility of using a plain form letter. It is the easiest of all form letters to ready for mailing, as well as the most letter-like in appearance. It was designed to eliminate nonessential fill-ins. Essential references such as dates, amounts, and claim numbers, may be typed at the heading or the foot. See Figure 4.

(A) PLAIN FORM LETTER WITH HEADING FILL-IN

 **U. S. TREASURY DEPARTMENT**  
OFFICE OF THE DIRECTOR OF INTERNAL REVENUE  
CUSTOMHOUSE  
BALTIMORE 2, MARYLAND

IN REPLYING REFER TO: Code 1311

**To save paper, form letters are printed on short pages whenever possible.**

April 7, 1954

Mr. James O. Carrollton  
49 Glenway Drive  
Baltimore 7, Maryland

Correct amount of tax due: \$ 23.40  
Correct amount of refund : \$

Dear Sir:

Your income tax return for 1953 includes the income and the withholding credit of a dependent. Only the income of the taxpayer can be included on his return; or, if it is a joint return, only the income of husband and wife.

The income and the withholding tax credit of the dependent have been eliminated from your return. The difference in the tax will be reflected in the notice of tax due or in the refund which will be mailed to you.

The withholding statement, Form W-2, of the dependent, together with blank forms 1040, is enclosed for his use in filing his individual income tax return.

Very truly yours,

L. A. Chamberlin  
District Director

(B) POSTAL CARDS WITH FILL-INS ON THE ADDRESS AND THE MESSAGE SIDES

**Brief identification of the case may be placed on the face of the card, if no fill-ins are required on the reverse side.**

**Spaces for fill-ins are arranged to facilitate preparation.**

OFFICIAL BUSINESS

Mr. John Q. Blank  
321 Circle Avenue  
Big City, Idaho

C-1 254 587

DATE \_\_\_\_\_  
NAME \_\_\_\_\_  
FILE NO. \_\_\_\_\_ (i. e., X-2, E. N., etc.)

This acknowledges receipt of \_\_\_\_\_

The letter has been referred, for attention and necessary action, to the Division of Disbursement, Treasury Department, Washington 25, D. C., to which office further communications on the subject should be addressed.

Signed \_\_\_\_\_  
Title \_\_\_\_\_

PL 4-78  
Aug. 1945  
Replaces Form 2200 which may not

Figure 4.

*Alined fill-ins.* As any typist can tell you, it is a bungling task to prepare for mailing a form letter that has scattered, unalined fill-ins.

Properly alined fill-ins begin on all lines at the same position of the typewriter carriage. See Figures 5 and 6.

The amount of blank space allotted for a fill-in should be measured by elite typewriter strokes (12 strokes to the inch). The number of stroke spaces should be sufficient for normal requirements. For example, the space left for a date with the month spelled out, should equal 19 elite strokes, sufficient for the longest date.

Seldom can the first draft of a letter be designed for alined fill-ins without some editorial changes. But so flexible is language that changes to conform to alinement can usually be made without changing the meaning and with actual improvement in the editorial quality.

*Itemized fill-ins.* As shown by Figures 7 and 8, fill-in space may be provided under column headings. The headings are usually printed across the page in the body of the letter. This is a neat and useful arrangement for describing more than one item of the same category, as several accounts or several checks. Brief fill-ins for names and dates are also appropriate under column headings.

Besides flexibility of space arrangement, itemized fill-ins have these two advantages: They are easier for the typist to prepare; they are easy for the reader to scan.

*Check list.* This pattern is designed for a number of optional statements. A box or other appropriate marking is printed at the beginning of each statement. When the letter is prepared for mailing, the applicable statement or statements are checked. See Figure 9.

The check-list memorandum is a particularly useful device for intra-agency correspondence. A central office which corresponds with field offices on routine matters can often dispose of a large percent of such correspondence with two memorandums: One, a check-list memorandum *requesting* information; the other, a check-list memorandum *giving* information. The field offices may use the same two-way device for getting and giving information.

For letters to the public, choose check-list statements carefully.

#### STANDARD DESIGNS

*There are six standard designs for form letters:*

*PLAIN: For letters that will not require fill-ins in the body. Figures 3 and 4.*

*ALINED FILL-IN: For arranging fill-ins that fall in the body of the letter, in a left margin alinement. Figures 5 and 6.*

*ITEMIZED FILL-IN: For grouping fill-ins, such as names, dates, and amounts, in one place under column headings. Figures 7 and 8.*

*CHECK LIST: For optional statements. Figure 9.*

*REFERENCE NUMBER: For optional statements printed on the back of the letter. Figure 10.*

*FORM-LIKE: For letters which are part box-type form. Figures 11, 12, and 13.*

DEPARTMENT OF  
HEALTH, EDUCATION, AND WELFARE  
SOCIAL SECURITY ADMINISTRATION

BUREAU OF OLD-AGE AND  
SURVIVORS INSURANCE

IN REPLYING, ADDRESS: SOCIAL SECURITY ADMINISTRATION  
FIELD OFFICE  
ATLANTA, GEORGIA

July 27, 1954

Mrs. T. J. Brown  
110 Mills Lane  
Valdosta, Georgia

Dear Mrs. Brown:

This is in reply to your recent letter regarding social security benefits. It is not clear to us whether you wish to apply for old-age insurance benefits which are administered by this office, or for some other type of benefit provided under the Social Security Act.

Federal old-age insurance benefits are payable to persons who have reached the age of 65 and have worked in occupations which are covered by the Social Security Act. If you have reached the age of 65 and have been engaged in a type of work which is covered by the Social Security Act, please notify us of that fact by filling out and returning the form on the back of this letter. If you are in doubt whether your employment has been covered by the law, it is suggested that you complete the form anyway, so that we may advise you whether you are entitled to benefits.

If you are not yet 65 years old, but have worked on jobs covered by the Social Security Act, you should inquire at the nearest local claims office of the State employment security agency for information as to whether you may be eligible to receive unemployment compensation benefits. There is a claims office of the State employment security agency at 511 E. Hill Ave., Valdosta, Georgia.

If you have not been engaged in an occupation or business which is covered by the Social Security Act but are in need of financial assistance, you should make inquiry regarding your rights at the public welfare office. The nearest public welfare office for your vicinity is located at 315 Kay Street, S., Valdosta, Georgia.

If this office can be of any further service to you, please feel free to call on us again.

Sincerely yours,

Manager

ALL FILL-INS ARE IN LEFT  
MARGIN ALINEMENT TO MAKE  
THE TYPING JOB EASIER

Figure 5. FORM LETTER WITH FILL-INS ALINED AT LEFT MARGIN



DEPARTMENT OF THE NAVY  
NAVY DISCHARGE REVIEW BOARD  
WASHINGTON 25, D. C.

IN REPLY REFER TO  
EXOS:QB(411)

July 1, 1954

Mr. Paul Patterson  
50 Vine Street  
Holly Valley, Alabama

Dear Sir:

The review of your discharge was held as scheduled, in accordance with the regulations governing the procedures of this Board. It is the decision of the Board that your original discharge from the United States Navy be changed to honorable.

The proceedings of the Board and its final case have been reviewed and approved by the Navy. The Chief of Naval Personnel is to issue to you the type of discharge certificate described above.

The following paragraph is applicable in your case only when checked

☐

Your original discharge certificate should be mailed to the Bureau of Naval Personnel, Department of the Navy, Washington 25, D. C. If the certificate is not available by reason of having been lost or destroyed, the enclosed form should be completed and returned to the Bureau of Naval Personnel.

Sincerely yours,

President  
Navy Discharge Review Board

NAVEXOS 2588

By leaving the blank space at the end of the line and the paragraph it is easy to vary the length of the fill-in.

Figure 6. ALINED FILL-IN COMBINED WITH CHECKMARK



VETERANS ADMINISTRATION  
WASHINGTON 25, D.C.

November 15, 1954

IN REPLY REFER TO: 13 D

Mr. R. C. Jones  
2000 Somerset Lane  
Center 7, New York

Dear Mr. Jones:

We have been notified that the deductions from your benefit payments which you previously authorized for premiums on your National Service Life Insurance have been discontinued. Premiums are paid as explained below:

Policy Number	Amount and Plan of Insurance	Monthly Premium	Last Monthly Premium Paid by Deduction	Due Date of Next Premium
V 123 45 57	\$5000 30-pay life	\$8.35	October 1954	November 1, 1954
V 321 54 78	\$2000 20-pay life	\$4.25	June 1954	July 1, 1954

In order to continue insurance protection it is necessary that you resume the payment of premiums. Regular premium notices will be sent to you, but in the meantime the premium due on the date shown above and all subsequent premiums should be paid when due or within the grace periods of 31 days following the due dates. Remittances should be made payable to the Veterans Administration and sent to the Collections Unit of this office. Please make certain that you include your insurance policy number with each remittance.

If you wish to pay premiums on a quarterly, semiannual, or annual basis, you may complete the enclosed VA Form 9-1555, Request for Change of Mode of Premium Payment, sign and return it to this office with a remittance sufficient to cover at least the first premium due at the rate for the mode of payment you select. The correct rates for the different modes of payment are shown on the form.

Very truly yours,

Encl.

FL 9-366  
Aug 1952(R)

Column headings, such as are used in this letter, are convenient whenever there is a possibility that it will be necessary to describe several items in the fill-in space.

An inquiry by or concerning an ex-service man or woman should, if possible, give veteran's name and service number, whether C, XC, K, N, or V. If such file number is unknown, service or serial number should be given. VA-DC. 71807

Figure 7. ITEMIZED FILL-INS



Don't attempt to cover every phase of a subject in one form letter. Avoid hodge-podge, as well as an invitation to additional, unnecessary correspondence, by keeping all statements closely related. For example, one letter might list statements as to why an application is disapproved; another might list statements describing what is needed to complete an application. But one letter should not attempt to combine both lists.

**Reference number.** Here is a variation of the check-list, to be used when optional statements are printed fully or partially on the back of a letter. See Figure 10. Note that the items follow the close, and are identified by numbers rather than check marks. The addressee's attention is called to applicable statements by item numbers, typed or written in longhand in a space provided in the head of the letter. Reference-number memorandums, like check-list ones, are useful for intra-agency correspondence.

TO: Mr. Calvin McDonald  
2 Jay Street  
Washington 14, D. C.

REQUEST FOR WITHHOLDING STATEMENT, FORM W-2

FROM: Office of the District Director  
Internal Revenue Service  
Custom House  
Baltimore 2, Maryland

Date: March 12, 1954

Your withholding statements, Form W-2, from the employers named below are missing from your Federal Income tax return.

Withholding statements are required as proof of the amount withheld from your wages for income tax and of the wages received as indicated on your return. Please return this notice promptly with the missing Forms W-2 attached.

Employer

Space for itemized fill-ins under a printed column heading.

Washington Note Book Company, Washington, D. C.  
Charles Town Printing & Binding, Inc., Charles Town, Maryland  
The Print Shop, Baltimore, Maryland

FL-2

Figure 8. ITEMIZED FILL-INS

**Form-like.** A form letter should be converted to a form whenever suitable and advantageous. By so doing, you condense the subject matter, often at a paper savings.

Sometimes, however, there are convincing arguments for approaching the reader with a letter rather than a form. There are also instances when the subject matter lends itself to a box-type format in part only. The most common example is the letter requesting the reader to supply certain information. From this situation may come a letter with a form printed at the foot or on the back: A combination of a conventional letter and a box-type form.

**UNITED STATES CIVIL SERVICE COMMISSION**  
**BUREAU OF DEPARTMENTAL OPERATIONS**  
WASHINGTON 25, D. C.

ADDRESS REPLY TO  
"CIVIL SERVICE COMMISSION"  
AND REFER TO  
FILE 12-7  
AND DATE OF THIS LETTER

November 17, 1953

Miss Mary Anne Wadsworth  
10 Elm Avenue  
Bethesda 14, Maryland

A bracket mark is appropriate on checklist and form-like form letters to show where the address is placed.

A fold mark is helpful when letters are hand folded.

Dear Miss Wadsworth:

Blocks for checking applicable portions of your appeal from a statement are drawn at the left margin. We have indicated in the paragraph checker below:

☒ Your letter has been accepted as an appeal. You will be advised of our decision in your case upon completion of our investigation.

☐ In keeping with Civil Service Regulations, employees involved in certain adverse personnel actions have the right of appeal within definite time limits. Reduction in force appeals must be made within ten days after receipt of notice. In your case, the period for filing such appeal has lapsed. Your letter cannot, therefore, be accepted as an appeal.

☐ In order to expedite action on situations arising in the field service, Civil Service Commission Regulations provide for action by the appropriate regional office of the Commission. Your communication is being forwarded to the Regional Office listed below for appropriate action.

☐ Pamphlet 41, containing information on reduction in force matters, is enclosed for your information.

Sincerely yours,

Chief, Appeals Examining  
Office

USCSC--WASHINGTON D C

DAE 3  
FEBRUARY 1954

Figure 9. CHECKLIST FORM LETTER

The way the form is combined with the letter depends on its purpose. If the letter is to be returned by the addressee with the form part completed, the form is more appropriately placed at the foot or on the back of the letter (Figure 11). When the addressor completes the form, it may be printed at the heading of the letter or in the body (Figure 12).

Unless you are yourself a forms designer, you should design your form-like letters in collaboration with a person who is. Keep in mind, too, that letters with form portions that are completed and returned by the addressee must be coordinated with those responsible for the agency's Federal reports control activity.

## COMMON TRAITS OF ALL PATTERNS

Once you have chosen the basic pattern for a form letter, the details of design are relatively simple. There are, in fact, these details of design common to all patterns:

**Address.** Usually, form letters to the public are mailed in window envelopes. It is then necessary to type one address only, the one at the top of the letter.

A dot (.) printed 2-1/4 inches from the top of the page and 1 inch from the left edge, will show the typist where to begin typing the address. Brackets may be used instead of a dot if this more conspicuous marking is not objectionable.

**Salutation.** Salutations are printed in full ("Dear Sir" or "Dear Madam"), or the space for the salutation is left blank so that it may be typed in full with the addressee's surname. Partial printing of a salutation - as printing "Dear" and leaving the surname to be typed in, only makes the typist's job more difficult.

A salutation begins seven spaces below the first line of an address so that it will not appear in the window of the envelope

**Margins.** The common, standard margin for letters mailed in window envelopes is one inch. Narrower margins can be used to save space on intra-office memorandums which are mass-mailed in one envelope.

When there is no printed salutation, extreme care must be taken to make sure that the first line of the body of the letter begins on the proper space. For window envelope mailing, this space is 9 spaces below the address mark, or 3-3/4 inches from the top of the page.

**Close.** When space permits, it is a good practice to print the complimentary close 5 or more single line spaces below the last line of the body of the letter. This provides space for typing an extra paragraph, if needed.

It saves time for the person signing the letter, as well as for the typist, if his name and facsimile signature are printed. But the time saved is more than offset by the obsolescence of the letter in case of a change of signing official.

The safe practice is to limit printed names and facsimile signature to letter stocks that will be used up in short periods of time. Signatures on letters that will be used longer and less frequently may be rubber-stamped.

## IDENTIFYING THE FORM LETTER

If your agency does not have a standard system for numbering form letters you should develop a "local" system that can be followed by the organizational units covered by your project. The information on page 25 may help you in deciding on your local system.

## SELECTING MATERIALS

Form letters are usually reproduced in standard-letterhead sizes. However, form-like form letters need not conform to standard letterhead size if:

### STANDARD SIZES

*Letterheads and memorandums: 8" x 10½", 8" x 7", and 8" x 5¼"*

*Postal cards: 3¼" x 5½"*

They fold properly to fit window envelopes, and

They can be cut from paper sizes 17" x 22" without waste.

You can economize on paper by using short pages whenever the length of the letter text permits.

Standards for determining supply, reproduction methods, and paper weights and grades should be worked out with the agency's publication service. In working out the standards, keep in mind:

**Supply.** Letter text may change with laws, policies, regulations, and even procedures. With obsolescence so likely, it is inadvisable to order more than a six-months supply.

**Reproduction method.** For the sake of appearance, the offset process (or letter-press for large quantities) is preferred for reproducing letters that will go to the general public. Mimeograph is suitable for intra-agency correspondence except when the number of impressions is so large that the offset method is more economical. Mimeograph may be substituted for public letters when the quantity is small and offset facilities are not available.

**Paper.** In reproducing letters by offset, plain paper rather than printed letterheads should be used, the letterhead being offset with the letter. This method

Approved For Release 2001/05/08 : CIA-RDP74-00005R000100020001-1  
costs less. Moreover, it gives flexibility to design. Even a slight adjustment in the placement of the letterhead may improve the spacing of the form letter.

Chemical wood white writing paper, 32 to 40 pound substance, is of a quality and appearance satisfactory for printed letters. The more costly rag-content bond should not be used unless fully justified.

File copies may be easier to print when reproduced on 18 to 32 pound chemical wood paper, rather than manifold paper. Obviously, however, manifold paper takes less filing space, which is an important consideration.

#### COMMONLY SPECIFIED PAPER WEIGHTS AND GRADES

##### *Mimeograph:*

*For letterhead and file copies:  
40 pound substance chemical wood.*

##### *Offset and letterpress:*

*For letterhead copies: 32-  
40 pound chemical wood  
white writing paper.*

*For file copies: 18-32 pound  
chemical wood or manifold  
paper.*

*For postal cards: 188 pound  
card.*

### DECIDING ON THE ESSENTIAL NUMBER OF FILE COPIES

Time studies in industry show that the cost in typing time and paper runs from \$5.00 to \$7.50 a thousand to make a carbon copy of a letter.

Even so, this cost is relatively small compared to the cost of filing the carbon copies, which runs to at least \$100 a thousand copies.

Here are three suggestions for keeping extra copies at an essential minimum:

1. Find out how many copies are prepared on each existing form letter and what disposition is made of each copy. This information should be on the samples when you receive them. Get the same information about the typed letters you propose converting to form letters.
2. Find out if the copies are actually needed, or whether they are simply conveniences that may be dispensed with. In the case of file copies, decide where one copy can be filed to serve the needs of all offices. In the case of courtesy copies, question the usefulness of the copy to the addressee.
3. Cut out *all* copies whenever possible. All copies can be cut out when:
  - a. The letter is of a routine informational nature, and a copy in files only serves to show that it had been dispatched.
  - b. The form letter is a reply to an incoming letter which can be filed with a notation of the form letter number and the date it was sent.

STANDARD FORM NO. 64

# Office Memorandum

Read this "made-up" form letter. The items at the foot of the page contain useful information.

UNITED STATES GOVERNMENT

TO : Deputy Regional Director, 7 RM  
Dallas, Texas

DATE: July 30, 1954

FROM : Director, Records Management Division, NARS  
Washington 25, D.C.

SUBJECT: Instructions for introducing new form letters

Items: 1, 3

Reference numbers are typed to indicate which items are applicable.

Samples of the following new form letters are enclosed:

GSA Form 1002, 3007, 3008, 4100, 4101

The enclosed form letters are designed so that typists can insert fill-ins easily and quickly. When a new form letter is introduced in a section or unit, complete instructions on its preparation should be given to each person who will use it. Arrangements should also be made for stocking the letters so that they will be readily accessible to typists.

Please refer to the item(s) indicated above. The items indicated are printed below or on the back of this memorandum.

We should appreciate your comments on these letters. If you have ideas for improving them, give us the benefit of your suggestions.

Encls.

Item 1. Introduce the form letters with an instructional memorandum. The instructions should include information as to the number of copies to be made, the disposition of the copies, the enclosures, and the technique for making the fill-ins. An instructional memorandum is a good way to put a new letter into use when the section or unit has only a few form letters.

Item 2. Develop a set of instructional cards or a looseleaf manual, specifying the procedure for handling each form letter. The cards or manual entries should be arranged in numerical order according to form letter numbers. Each number should be followed by complete instructions on how to prepare the letter, including instructions on number of copies, disposition of file copies, enclosures, and techniques for making fill-ins. This is the preferred method when a section or unit uses a large number of form letters.

Item 3. Give each typist a small supply of form letters so she need not make repeated trips to the supply cabinet. A small rack on the typist's desk is useful when she has more form letters than can be conveniently arranged inside the desk drawer.

Other item numbers are printed on the back of the form letter.

GSA Form 1001

Figure 10. REFERENCE - NUMBER FORM LETTER



VETERANS ADMINISTRATION  
WASHINGTON 25, D. C.

May 5, 1954

IN REPLY REFER TO: IN-15 PA

Miss Mary Jane Thompson  
10 Rollaway Drive  
Corinth City, Louisiana

Dear Miss Thompson:

Your application for reinstatement of your government life insurance may not be accepted without a supplemental statement of health for the reason indicated by check mark.

☐ Undated ☒ Post dated ☐ Submitted more than 5 days after execution.

Please complete and return the statement below within fifteen days after the date of this letter so your application may be given further consideration.

Very truly yours,

When the addressee is requested to fill in the form, it is appropriately printed at the foot of the letter.

Director, Insurance Accounts Service

STATEMENT OF HEALTH	
(SUPPLEMENTING NONMEDICAL APPLICATION FOR REINSTATEMENT)	
IMPORTANT: THIS SHOULD BE GIVEN YOUR IMMEDIATE ATTENTION.	
3. DATE APPLICATION FOR REINSTATEMENT WAS MAILED OR OTHERWISE DELIVERED TO THE VETERANS ADMINISTRATION (Postmark date, if mailed)	4. DATE OF LAPSE
5. WERE YOU IN AS GOOD HEALTH ON THE DATE YOUR APPLICATION FOR REINSTATEMENT WAS MAILED OR OTHERWISE DELIVERED TO THE VETERANS ADMINISTRATION (Shown in item 3) AS YOU WERE ON THE DATE OF LAPSE (Shown in item 4)?	
<input type="checkbox"/> YES <input type="checkbox"/> NO (If "NO", complete item 6)	
6. REMARKS (Give dates and full particulars including names and addresses of all practitioners consulted.)	
This statement must be dated and signed and should be mailed or otherwise delivered to the Veterans Administration within 15 days from the date of the above letter.	
7. DATE	8. SIGNATURE OF APPLICANT (Do not print)

Budget Bureau No. 78-8284  
Approval expires 2-28-55

FL 9-431

Feb 1951

An inquiry by or concerning an ex-service man or woman should, if possible, give veteran's name and file number, whether C, XC, K, N, or V. If such file number is unknown, service or serial number should be given. VA-DC-114895

Figure 11. FORM-LIKE FORM LETTER

## Office Memorandum • UNITED STATES GOVERNMENT

TO : Registration and Research Section

DATE:

FROM : Voucher Audit Section

SUBJECT: Voucher Received Showing Charges in Excess of Estimated Amount

1. The information listed below is submitted with the request that you certify to the Finance  
When the form is filled in by the office writing the letter, it is appropriately printed in the body.

A. Name of Veteran		B. C-Number	
C. Institution		D. Enrollment Period	
		From: To:	
E. Estimated Total Charges (Per VA Form 7-1907 Series)		F. Amount in Excess of Estimated Total Charges	
\$		\$	

2. If the veteran has sufficient remaining entitlement to approve payment of the amount shown, the copy of this memorandum should be used in lieu of VA Form 4-1401.

*Voucher Auditor.*

End. 1

TO: Voucher Audit Section

1. The dollar value of the unencumbered remaining entitlement of the veteran listed above is \$.....

2. The veteran's remaining entitlement has been adjusted on the basis of the information furnished above. A VA Form 4-1401 will not be required unless the total charges for this period of enrollment are subsequently adjusted.

Preprinted endorsement helps insure that the requested information will be written on the letter. This saves paper and filing time.

*Registration Officer.*

FL 4-179  
July 1960 (28)

16-62907-1 U. S. GOVERNMENT PRINTING OFFICE

Figure 12. FORM-LIKE MEMORANDUM



# GENERAL SERVICES ADMINISTRATION



*Emergency Procurement Service*  
Washington 25, D. C.

Date

In accordance with instructions contained in Bureau of Customs Circular Letter No. 2666, dated August 9, 1949, and the provisions of Public Law 152, 81st Congress, please arrange for entry of the material described below, free of duty. Certification by this Administration will be made on this shipment upon receipt of Consumption Entry Form from your office. A negotiable bill of lading or Carrier's Certificate will be furnished previous to the arrival date indicated.

PRO-FORMA INVOICE		
SOLD TO General Services Administration, Emergency Procurement Service Washington 25, D. C.		
SOLD BY		CONTRACT NUMBER
DESCRIPTION		PRODUCT OF
NAME OF VESSEL	PORT OF ARRIVAL	DATE OF ARRIVAL
VALUE AT FOREIGN PORT OF LOADING		\$
OCEAN TRANSPORTATION TO UNITED STATES \$ PER LONG TON		\$
TOTAL VALUE ON ARRIVAL AT UNITED STATES PORT		\$

Prepared by:

Storage and Transportation Division  
Emergency Procurement Service

GSA FORM 91  
September 1950  
(Formerly TS 1717 Rev.)

GSA-WASH DC 51-7874

Figure 13. FORM - LIKE FORM LETTER

## **IV. SETTING UP AND OPERATING FORM LETTER CONTROLS**

Thus far you have viewed form letter improvement as a project, or a series of projects, in which new form letters are developed and existing ones revised in accordance with accepted standards. But form letter improvement, to be of lasting value, must also include certain continuing control operations in which both administrative and supervisory employees have a part.

### **THE ROLE OF STAFF EMPLOYEES**

If you hold a staff job, such as a correspondence management specialist, a records officer, an organization and methods examiner, or an administrative assistant, you may be called on to set up a continuing form letter control program. A continuing program for controlling form letters includes:

1. Reviewing each request for a new or revised form letter, as the requests originate in the using offices.
2. Applying the standards outlined in Part III to each request.
3. Keeping records of all approved form letters.

### **CENTRAL CONTROL VS. LOCAL CONTROL**

The first questions to decide in setting up a form letter control program are: Who will be responsible? Will the letters be reviewed at one central point or at a number of local points?

If an agency or bureau is small and its offices conveniently located, centralized control may be practical. By centralized control is meant the review at one central headquarters point of all requests for form letters originating throughout the agency or bureau.

Generally, centralized control is not practical. A large organization with scattered offices, or any organization using large quantities of form letters, can gain particularly by keeping control near the program or office to which the letters belong. Incidental paperwork is reduced, service is speeded, and participating offices have more proprietary interest in the control plan.

In fact, by making standards such as those outlined in Part III available to the operators, any agency may operate decentralized control successfully. The operators of the control plan must be selected, however, and given the authority needed to do the job.

### **CHOOSING A NUMBERING SYSTEM**

Even though the control of form letters is decentralized, a standard system of numbering letters is advisable.

Some agencies use the same numbering system for form letters as for forms. Other agencies have found it convenient to make a distinction.

Here are some suggestions for a form letter numbering system:

*Distinguishing code.* A printed form letter may be distinguished by the code "FL" or the word "Letter" preceding the number.

*Basic number.* In any numbering system, a basic number is needed to identify specific letters. Basic numbers are usually assigned in straight numerical series.

*Affixes.* Do you need to know the major organizational element (branch, service, or division) to which a letter belongs?

A simple way to identify organizational elements is to prefix the basic number with the organizational code symbol. For example, the organization symbols "SP" and "6" show the organization to which the letters "Letter SP-60" and "FL 6-702" belong.

*Suffixes.* Is there a small group of closely related letters that need to be recalled in their group relationship? For example, a series of letters involving first, second, and third notices of payments due?

A series of closely related letters may be assigned the same number and distinguished by alphabet suffixes. For example, FL 7-103a, FL 7-103b, and FL 7-103c.

*Date.* Do you wish to show the current edition date?

The date of the original issue or the revised issue is usually printed in skeleton or abbreviated style under the identification number, as:

FL 10-71  
Apr. 54

FL COL-17  
Rev. 4-54

*Placement.* Where will you print the number?

Decide on a standard placement which is suitable to the style of the letterhead and which will not interfere with initialing and filing practices. Because of the letterhead and the common practice of initialing file copies at the lower right, the number is usually printed at the lower left of the page.

## CHOOSING A CONTROL PROCEDURE

The control procedure for forms, like the numbering system for forms, can be adapted to form letters. But whether you adapt an existing procedure or write a new one, you must provide for these functions:

*Recording.* Keeping a simple reference file of form letters.

*Analyzing.* Judging the need of the letter and of the file copies; checking the reference file for similar letters that may be replaced or consolidated.

*Applying standards.* Seeing that the letter is appropriate, economical, easy to read, and properly designed, in accordance with the standards in Part III; consulting editor-writer when necessary to improve the text.

*Clearing and coordinating.* Getting together on changes with the people who asked for the letter; clearing the letter with all other units concerned.

*Identifying.* Giving the letter a standard number.

*Going to press.* Getting the letter to the publications service with instructions for reproducing and distributing.

Note that any control procedure built around the above tasks must answer this question: How do requests for new and revised form letters get in and out of the control unit? In other words, what is the office originating the letter expected to do?

Keep the procedure for requesting form letters simple and easy for the originating office to comply with. Remember, a control ensnared in a complicated procedure is doomed, even in the most receptive agency. It may be necessary to require that new and revised form letters be requested in writing, perhaps by use of a standard form. But, if you are bidding for success:

Don't ask for any copies of the request form or of the proposed form letter that you can possibly do without.

Don't ask for information that is not absolutely essential or that can be had from another source.

And don't, above all things, ask for justification. An analyst can usually tell whether a letter should be printed by studying its text and noting the number of typings that will be cut out. The originating office can justify the letter after disapproval if it is turned down under unusual circumstances.

Actually, only the barest details are needed to handle a request for a form letter: Who wants it, the usage rate, and the number and disposition of file copies.

## STANDARDIZING FORM LETTERS FOR FIELD OFFICES

Obviously, two or more field offices with the same function must write letters on the same subjects. From this necessity arise many opportunities to make one form letter work for several field offices.

In centralized control, where all form letters are reviewed at one point, the opportunities for standardization are easily detected. In decentralized control, possibilities of standardized letters must be detected through audits.

Audits are conducted on a program basis, as follows:

1. Form letters belonging to a particular program are collected from all field offices.
2. A central office representative of the program activity is asked to review the collection to make recommendations for standard letters to be used in all field offices in place of the local ones.
3. The standard letters are developed and distributed to all field offices with instructions on their use.

### ENCOURAGING THE USE OF FORM LETTERS

As Figure 1 of this book illustrates, a form letter is a sharp device for cutting correspondence costs. Hence, as an administrative employee responsible for the program, you should look for means to stimulate the use of form letters.

An obvious and successful stimulus comes from letting all employees know that the agency head approves of form letters. His policy should be made known in writing, by issuing an initial policy statement and an occasional reminder to use form letters whenever appropriate and economical.

Another stimulus comes from guidance to supervisors in ferreting out form letter possibilities. This guidance usually takes the form of a project, such as is described in Part II.

Top management support and guidance are not the only means of stimulating the use of form letters. In analyzing special correspondence problems you will undoubtedly come up with your own ideas on the subject.

### CATALOGING

A form letter catalog can be a useful reference source in offices having a large number of form letters. The best catalogs are those with a classified subject index, as well as a numerical index.

Form letter listings may be included in a forms catalog or in an index of publications without the necessity of a separate issuance.

## THE ROLE OF THE SUPERVISOR

Now that we have examined the role of staff employees in controlling form letters, let us see what supervisors can do to keep good, up-to-date form letters in use on a continuing basis.

### LOOKING FOR FORM LETTER POSSIBILITIES

If you are a supervisor who has used form letters, you will recognize that the ones which begin haphazardly are poor risks.

Actually, there is no need of guessing about form letters. As a supervisor, you should test your correspondence to find out whether form letters are appropriate and economical. You should then analyze the form letter possibilities to see exactly what designs would be best suited for your requirements. Do it this way:

1. If there has not been a form letter improvement project conducted in your office, begin there. Part II of this book tells you exactly how to go about a project of this kind.
2. At periodic intervals after the big improvement project - perhaps twice a year - ask that an extra copy be made of each typed letter. Ask that this be done about two weeks, or long enough to get a fair sampling. Look for form letter possibilities in this periodic sampling, just as you did in the initial improvement project. Then develop the new possibilities just as you did in the initial project.
3. Remember that it is economical to keep file copies at an essential minimum. Make occasional spot checks to see whether more copies are being made than are needed.
4. If your agency has a program for controlling form letters, cooperate with the administrative personnel responsible for the program in every way possible.
5. At periodic intervals review the form letters (after they are prepared for mailing) to see how well they are working. You may find that the text needs simplifying; or you may find adjustments and additions being typed which could be printed in the letter.

#### INTRODUCING NEW FORM LETTERS

If a new form letter is going to work for you, it should have a proper introduction to your staff. You can then be sure that all members of the staff are acquainted with the new form letter and what it will do.

The instructional memorandum or other written procedure introducing the new or revised form letter should cover these points:

1. The subject of the new or revised form letter.
2. The purpose for which it will be used.
3. Who will use it.
4. The manner in which it will be prepared, whether by longhand or typewriter.
5. The types and disposition of file copies, if any.
6. The enclosures, if any.
7. The manner of review and signing.

Of almost equal importance with the introduction of new letters is the purge of old ones when they become inactive or obsolete. In the stock room and supply cabinets these old letters take up valuable space. In desk drawers they are efficiency hazards, often dispatched in error.

When a form letter is discontinued for any reason whatsoever, announce the fact to your staff immediately and see that the supply is removed from supply cabinets and desks.

## TABLE OF COMPARATIVE COSTS

Dictated Letters(D), Guide Letters(G), and Form Letters(F)

LENGTH IN LINES	VOLUME							
	500	1,000	2,000	5,000	10,000	20,000	25,000	50,000
5 D	148	297	594	1,484	2,969	5,937	7,422	14,843
G	68	134	265	659	1,315	2,628	3,284	6,566
F	49	94	185	457	912	1,820	2,275	4,547
6 D	178	356	712	1,781	3,562	7,125	8,906	17,812
G	75	147	291	722	1,441	2,879	3,598	7,193
F	50	95	186	458	912	1,821	2,276	4,548
7 D	208	416	831	2,078	4,156	8,312	10,390	20,780
G	82	160	316	785	1,567	3,130	3,912	7,819
F	50	96	186	458	913	1,822	2,276	4,549
8 D	237	475	950	2,375	4,750	9,500	11,874	23,749
G	89	173	342	848	1,693	3,381	4,225	8,446
F	51	96	187	459	914	1,823	2,277	4,550
9 D	267	534	1,069	2,672	5,343	10,687	13,359	26,717
G	96	186	368	912	1,818	3,632	4,539	9,072
F	51	97	187	460	914	1,824	2,278	4,552
10 D	297	594	1,187	2,969	5,937	11,874	14,843	29,686
G	102	199	393	975	1,944	3,883	4,852	9,699
F	52	97	188	460	915	1,824	2,279	4,553
11 D	327	653	1,306	3,265	6,531	13,062	16,327	32,655
G	109	212	419	1,038	2,070	4,134	5,166	10,325
F	53	98	189	461	916	1,825	2,280	4,554
12 D	356	712	1,425	3,562	7,125	14,249	17,812	35,623
G	116	225	444	1,101	2,196	4,384	5,479	10,952
F	53	99	189	461	916	1,826	2,281	4,555
15 D	445	891	1,781	4,453	8,906	17,812	22,265	44,529
G	136	264	521	1,290	2,573	5,137	6,420	12,832
F	55	100	191	463	918	1,828	2,283	4,559
20 D	594	1,187	2,375	5,937	11,874	23,749	29,686	59,372
G	170	330	649	1,606	3,201	6,392	7,988	15,964
F	58	103	194	466	921	1,832	2,288	4,564
25 D	742	1,484	2,969	7,422	14,843	29,686	37,108	74,215
G	204	395	777	1,922	3,830	7,647	9,555	19,097
F	61	106	197	469	925	1,836	2,292	4,570
30 D	891	1,781	3,562	8,906	17,811	35,623	44,529	89,058
G	238	460	905	2,237	4,459	8,902	11,123	22,230
F	64	109	200	472	928	1,840	2,296	4,576
35 D	1,029	2,078	4,156	10,390	20,780	41,560	51,951	103,901
G	272	526	1,033	2,553	5,088	10,156	12,691	25,362
F	67	112	203	475	931	1,844	2,300	4,582

Cost of dictated (D) and guide (G) letters by the line (12 words) is based on a yearly average wage of \$3,150 for stenographers and typists and \$4,120 for dictators and reviewers, applied to these representative production rates:

Operation	Time Per Letter Line
Typing from dictation.....	30 seconds
Typing from straight copy.....	24 seconds
Stenography (taking shorthand notes).....	20 seconds
Checking/reviewing dictated letters.....	8 seconds
Checking/reviewing guide letters.....	4 seconds
Getting ready to dictate (gathering facts, preparing notes, etc.).....	40 seconds

## Form Letter Cost Includes:

(1) Proportionate cost of writing and designing the letter before printing, based on a yearly average wage rate of \$6,450 and a time allowance of 10 minutes a line.

(2) Proportionate cost of printing, based on GSA's Price List Memorandum 11-1951 (revised to 1-29-54).

(3) Cost of preparing the form letter for mailing, based on representative time rates of 1 minute dictating time inspection and assignment of the letter, 1.5 minutes typing, and .5 minutes checking/reviewing.



## V. COUNTING THE COST OF CORRESPONDENCE

### CORRESPONDENCE PRICE RANGE

The cost of writing and filing a routine, average-length letter may vary from 25 cents to a dollar, depending largely on letter writing and filing practices.

There are many devices for cutting the cost of writing letters, but none is so sure or so sharp as the printed form letter.

Figure 1 of this pamphlet tells the correspondence price-range story. It does not tell how much you save from the use of a *specific* form letter, for that depends on the length of the letter. It does give you an idea, however, of how much you save from using a number of form letters.

Take, for example, the case of the office that writes 250 thousand letters a year, costing roughly 200 thousand dollars to dictate and type. Replace 25 percent of these letters with form letters, and the correspondence price drops 22 percent; replace 55 percent of the letters with form letters, and the correspondence cost is cut in half!

### FIGURING SAVINGS

Because letters do vary in length, it is advisable to use a line count to estimate dictating and typing costs in specific cases. Then, by comparing dictating and typing costs with the form letter cost, you can arrive at a good estimate of savings. A table such as the one printed on the opposite page is handy for this purpose.

Follow these steps in using the table to figure annual savings:

*Step 1.* Count the lines in the body of the form letter. Do not count the lines in the address, salutation, or close, but count all lines in the body of the letter as whole ones.

*Step 2.* Determine the number of times the form letter will be used during a year, basing your count on the number of times it has been typed in the past.

*Step 3.* Now look up the costs by checking the table for a letter of the same or approximate length and usage.

If your form letter is to replace dictated letters, subtract the form letter cost from the cost of the same number of dictated letters.

**EXAMPLE:** A 25-line form letter replaces letters which are dictated 2000 times a year. The table shows that \$2969 is the representative cost of 2000 25-line dictated letters and that \$197 is the representative cost of the same number of printed letters. The difference between these two figures, \$2772, is the annual savings.

If your form letter is to replace guide letters (ones that are typed from straight copy without dictation), subtract the form letter cost from the cost of the same number of guide letters.

**EXAMPLE:** A 30-line form letter replaces letters that are typed from straight copy (guides) 7500 times a year. The table does not give the cost of 7500 letters, but you can quickly estimate the cost at \$3348 which is the middle point between 5000 30-line guide letters and 10,000 30-line guide letters. Subtract \$700 for the form letter cost which is estimated in the same way. The remainder, \$2648, is the annual savings.

The figures in the table do not take into account the paper, space, or equipment costs, for in these respects the cost difference between form letters and individual ones is slight. The figures do take into account these operations which make essential cost differences:

Dictating to stenographers (including "get-ready" time), stenography (taking shorthand notes), typing, checking (proofreading), and reviewing.

Composing and designing a form letter preparatory to printing it.

Printing the form letter.

Using the same operations as a base, you can make up your own table of comparative correspondence costs; or you may expand this one to include other operations, such as machine dictation.

## FORM LETTER CHECKLIST

The questions are so worded that check marks in the "NO" column indicate the need for corrective action.

	YES	NO
1. Is the form letter designed so that the typist can make typed fill-ins easily?	<input type="checkbox"/>	<input type="checkbox"/>
2. Has a test been made to see whether a file copy of the letter is actually needed, or whether the prescribed number of copies can be reduced?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the letter easily understood on the first reading?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is it free of old fashioned letter language, such as "reference is made," "you are advised," and "examination of our records discloses"?	<input type="checkbox"/>	<input type="checkbox"/>
5. Has a "usage" test been made to see whether it is practical to carry a printed stock?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the letter concern a routine business or informational matter?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is there a mark to show the typist where to begin the address so that it will show in the window of an envelope?	<input type="checkbox"/>	<input type="checkbox"/>
8. Will the supply on hand be used up in a few months' time?	<input type="checkbox"/>	<input type="checkbox"/>
9. Is the letter identified in any way, as by a number printed in one of the corners?	<input type="checkbox"/>	<input type="checkbox"/>
10. If you were the person to receive the letter would you consider that you had received a really good and attractive letter?	<input type="checkbox"/>	<input type="checkbox"/>
11. Has a test been made of typed letters to see whether it is practical to replace any of them with form letters?	<input type="checkbox"/>	<input type="checkbox"/>
12. Is provision made for reviewing all requests for form letters to make sure that unnecessary, poorly written, or poorly designed letters do not slip into print?	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you have standards that you expect all form letters to meet?	<input type="checkbox"/>	<input type="checkbox"/>
14. Are form letters put into use by written instructions explaining when they are to be used, enclosures (if any) that should be made, and carbon copy requirements?	<input type="checkbox"/>	<input type="checkbox"/>
15. Do you have a systematic way of numbering form letters?	<input type="checkbox"/>	<input type="checkbox"/>
16. When form letters become obsolete are immediate instructions issued to discontinue their use and to remove old stock from supply cabinets and desks?	<input type="checkbox"/>	<input type="checkbox"/>



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